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HOW TO

Handle Your First (or Next) Probate

The Essential Guide to Probate Practice in Minnesota

YOU WILL LEARN:

- How to obtain all the **crucial client information** during the first meeting
- How to determine the correct **type of probate proceeding**
- Essential **tax concepts**
- How to manage **real estate transfers**
- How to handle **creditors' claims**
- The process for **closing and distribution**
- The **5 most common disputes** in estate litigation
- **And much more!**

Wednesday, May 7, 2025 – Attend In Person

Minnesota CLE Conference Center
600 Nicollet Mall, Suite 370, Minneapolis

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View an Online Replay on Wednesday, May 21, 2025 or
Monday, June 2, 2025

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8:30 – 8:55 a.m. CHECK-IN & CONTINENTAL BREAKFAST

8:55 – 9:00 a.m.

Welcome and Introduction

– Jennifer S. Santini, Course Chair

9:00 – 10:00 a.m.

First Steps: Intake and Fact-Finding

Learn the art of client intake and hone your fact-finding skills to glean critical information swiftly and effectively as you make a preliminary estate evaluation. Cultivate rapport-building techniques vital for establishing trust and understanding with clients.

– Scott A. Ruhsam & Tina M. Johnson

10:00 – 10:05 a.m.

Break

10:05 – 11:05 a.m.

Where Do We Go from Here: Formal v. Informal Probate

Familiarize yourself with the statutes that govern probate proceedings in Minnesota. How do you use your preliminary estate evaluation to determine whether to proceed formally or informally? What forms do you need to file in each type of proceeding? What is the difference between supervised and unsupervised probate proceedings?

– Scott A. Ruhsam & Tina M. Johnson

11:05 – 11:15 a.m. BREAK

11:15 a.m. – 12:00 p.m.

Navigating the Financial Landscape: Assets, Liabilities, and More

Evaluating the financial status of an estate requires attention to detail and a solid understanding of legal obligations. This session will equip probate attorneys with the skills needed to efficiently identify and categorize estate assets, liabilities, debts, and expenses. Learn best practices for handling creditor claims, including statutory deadlines, priority of payments, and dispute resolution.

– William R. Asp & Spencer R. Riegelman

12:00 – 12:30 p.m. LUNCH BREAK (on your own)

12:30 – 1:15 p.m.

Probate Tax Essentials: Filing Requirements, Deadlines, and Planning Strategies

A comprehensive overview of key tax obligations, including filing the decedent's final income tax return, selecting the appropriate tax year for the estate, and understanding income tax considerations for both the estate and its beneficiaries. We will also cover estate and gift tax filing requirements, including when Form 706 is necessary and how to claim estate tax portability. Additional topics include GST tax implications, coordinating with the decedent's financial advisors, and addressing common property tax concerns.

– Charles M. Austinson

1:15 – 2:00 p.m.

Management, Sale, and Distribution of Interests in Real Estate

Real property is a common estate asset and its transfer requires careful attention to specific rules and procedures. This session will cover key steps for smooth conveyance, how to identify and resolve pre-transfer issues, and strategies for efficient execution. We'll also explore unique real estate challenges and how to handle them within the probate process.

– Brandon J. Edmundson

2:00 – 2:15 p.m. BREAK

2:15 – 3:00 p.m.

Last Steps: How to Distribute Assets and Close the Estate

This session covers essential factors in estate closure and distribution. Learn the proper process for distributing various asset types and selecting the best method to close an estate, along with the required procedures for each approach.

– Andrew J. Peterson & Gregory R. Vichot

3:00 – 4:00 p.m.

Litigation Basics and the 5 Most Common Disputes in Estate Litigation

Learn about the common problems and issues in estate administration and how to handle situations when disputes or objections arise.

– Patricia J. Stotzheim & Bethany Rubis